

General Services Administration



FEDERAL SUPPLY SERVICE AUTHORIZED FEDERAL SUPPLY SCHEDULE PRICELIST

**Mission Oriented Business Integrated Services
(MOBIS)
Federal Supply Schedule Industrial Group 874
Industrial Class 874-2**

**JB&A, INC.
5203 Leesburg Pike, Suite 1401
Falls Church, VA 22041-3476
Phone: 703-399-2850
Fax: 703-399-2851
www.jb-a-inc.com**

Contract Number: GS-10F-0012K

Contract Period: October 15, 2009 through October 14, 2014



This Schedule Contract Price List includes modifications through No. PO-0014 effective October 14, 2009

For more information on ordering from Federal Supply Schedules click on the FSS Schedules button at <http://www.fss.gsa.gov>

On-line access to contract ordering information, terms and conditions, up-to-date pricing, and the option to create an electronic delivery order are available through GSA Advantage, a menu-driven database system. The INTERNET address for GSA Advantage is: <http://www.GSAAdvantage.gov>

Table of Contents

Section	Page
Customer Information.....	3
JB&A, INC. Executive Overview.....	4
Description of Professional Labor Categories	7
MOBIS Rate Tables.....	11
Ordering Procedures for Services Requiring a Statement of Work (SOW).....	12
Contractor Team Arrangements.....	15
Blanket Purchase Agreements	16

CUSTOMER INFORMATION:

- 1a. Table of awarded special item numbers:
SIN 874-1: Consulting Services.
SIN 874-2: Facilitation Services.
- 1b. Not Applicable.
- 2. Maximum order: **\$1,000,000.**
- 3. Minimum order: **\$300.**
- 4. Geographic coverage: **Domestic & Overseas.**
- 5. Point(s) of production: **Same as contractor's address.**
- 6. Discount from list prices or statement of net price: **Prices shown are net.**
- 7. Quantity discounts: **Not Applicable.**
- 8. Prompt payment terms: **Net 30 Days.**
- 9a. Government purchase cards that are accepted for all purchases up to the micro-purchase level.
- 9b. Government purchase cards that are accepted for all purchases.
- 10. Foreign items: **Not Applicable.**
- 11a. Time of delivery: **To be negotiated with the ordering agency on each task order.**
- 11b. Expedited Delivery: **To be negotiated with the ordering agency on each task order.**
- 11c. Overnight and 2-day Delivery: **To be negotiated with the ordering agency on each task order.**
- 12. F.O.B. point: **Destination, Location to be negotiated with ordering agency on each task order.**
- 13. Ordering address:
JB&A, INC.
Mr. Johnny L. Garrett,
Director, Procurement
5203 Leesburg Pike, Suite 1401
Falls Church, VA 22041-3476
- 14. Payment address:
JB&A, INC.
5203 Leesburg Pike, Suite 1401
Falls Church, VA 22041-3476
- 15. Warranty provision: **Not Applicable.**
- 16. Export packing charges: **Not Applicable.**
- 17. Terms and conditions of Government purchase card acceptance: Government purchase cards that are accepted for all purchases.
- 18. Terms and conditions of rental, maintenance, and repair: **Not Applicable.**
- 19. Terms and conditions of installation: **Not Applicable.**
- 20. Terms and conditions of repair parts indicating date of parts price lists and any discounts from list prices: **Not Applicable.**
- 20a. Terms and conditions for any other services: **Not Applicable.**
- 21. List of service and distribution points: **Not Applicable.**
- 22. List of participating dealers: **Not Applicable.**
- 23. Preventive maintenance: **Not Applicable.**
- 24. Environmental attributes: **Not Applicable.**
- 25. Data Universal Number System (DUNS) number: **194841219.**
- 26. Contractor **is registered** in Central Contractor Register (CCR) database.

Executive Overview

JB&A, INC. (JB&A) is an independent consulting firm established in 1988, to provide consultative and facilitation services. Our concentration is on strategic planning, programming and budgeting, and manpower analytical support to U.S. Government Agencies. We are expert in the Department of Defense (DoD) Planning, Programming, Budgeting and Execution (PPBE) system and the National Intelligence Program (NIP), in support of DoD and U.S. Intelligence Community activities. As an independent consulting firm that has Top Secret and special intelligence accreditation, JB&A ensures nondisclosure of privileged financial and force structure information obtained during the performance of these services.

JB&A provides core teams and independent senior professional Intelligence Operations Subject Matter Experts (SME) and Resource Management (financial and manpower) SME who provide consultative and facilitation services for:

- Strategic Planning Architectures.
- Organizational Analysis and Force Structure Management.
- Resource Management Programs.
- Executive Level Summary Analysis and Detailed Financial Analysis.
- Tutorial Training for PPBE and NIP Processes.
- Automated Decision Support System Applications Design to facilitate analysis of resource and manpower programs, individually and collectively across national defense programs.

Description of Services Provided

SIN 874-1 CONSULTATION SERVICES:

JB&A has developed a unique capacity to perform at government and other contractor locations in partnership with our clients to implement meaningful and lasting improvements for planning and programs analysis, budget development and execution. Our professional staff has in-depth experience and they are respected within the DoD and Intelligence Community as PPBE and NIP SMEs. We have developed a wide range of effective tools, techniques, methodologies, and strategies to help our clients exceed their leadership, management, organizational and program/budget goals and objectives.

Strategic Planning Architectures: We assist our DoD and Intelligence Community clients to develop holistic operational Architectures and Master Planning processes derived from The President's National Security Strategy (NSS) and the National Military Strategy (NMS). We use the client agency seminal and source documents to identify their goals, planning, and resource program/budget requirements. With the client, we focus on their needs to meet their goals and the objective requirements of the current year budget execution, next year budget development, mid-term resource programs (6-years) and long-term plans (10-15 years).

Organizational Analysis and Force Structure Management: JB&A partners with clients to help them better understand the detailed line item force structure composition of their organization(s). Using client agency, DoD, and Intelligence Community manpower databases, we assist the client to track their current organizational force structure to Defense and Congressional manpower authorizations. With the client, we align the current organization and force structure to the client's mid-to-long-term plans in their operational Architectures and Master Planning processes and provide a model for organizational force structure changes over the next six-year program cycle and the 10 to 15 year planning period.

Resource Management Programs: JB&A Resource Management SME provide consultative services at the customer site in partnership with client programming and budgeting personnel. We conduct studies and analysis to support program and budget development and justification. Our studies, analysis and evaluation support the client defense of their resource requirements at the DoD and Congressional decision-making levels.

Executive Level Summary Analysis and Detailed Financial Analysis: JB&A Resource Management SME team with software developers to design automated PC based decision support systems that provide our clients with macro and micro management views of their six-year programs and the next year budget. Our analysis is focused on investment strategies for all program and appropriation categories. JB&A Resource Management SME provide consultative advice to contract software personnel for the design, development, and evolution of the PC based DSS systems. JB&A SME also assist and facilitate client personnel in the use of the DSS for analytical reports and assessments in support of senior level decision-makers within the DoD and Congressional levels.

Tutorial Training for PPBE and NIP Processes: JB&A SME develop tutorials and provide training to client personnel on the use of the operational architecture DSS and the PC based DSS that support summary and detailed financial analysis. In addition, we provide tutorial training to client personnel in the complexities of the DoD PPBE and the Intelligence Community NIP processes.

Automated Decision Support System Applications Design: JB&A Intelligence Operations SME team with software developers to design automated, graphically oriented, interactive, decision support system (DSS) for design, display, and evaluation of client operational Architectures and Master Plans. The automated capability supports the assessment of changes in organizational force structure and modernization caused by decisions made in the PPBE, NIP, and combat developments process, or indicated by changes in operational concepts and predicted technology improvements. The DSS are also capable of providing assessment of the impact of these changes in logistics supportability requirements and contingency operations sustainment missions. Our SME provide consultative advice to software personnel for the design, development, and evolution of the DSS. JB&A SME also assist and facilitate client agency personnel in the use of the DSS for analytical reports and assessments in support of senior level decision-makers within the DoD and Congressional levels.

SIN 874-2 FACILITATION SERVICES

JB&A's Intelligence Operations and Resource Management SME provide facilitation services for intelligence system concept development and resource management decision support. Our focus is on intelligence collection systems, analysis systems, production and dissemination systems, to include costs and manpower.

JB&A facilitators organize Integrated Product Teams (IPTs) consisting of diverse groups of personnel from throughout the DoD and Intelligence Community representing Commanders of military service intelligence organizations, Joint Commands, and National Intelligence Agencies. The IPTs have both common and divergent interests in the concept development and potential need for changes in future doctrine, training, leadership, organizations, manpower force structure, and intelligence systems. Based on the results of the IPT process, our facilitators develop reports and provide technical and advice and analysis for our clients' needs for future change.

Our facilitators conduct studies and analysis to advise and assist client agencies working with the staffs of the Commanders of Joint Commands, the Military Services, the Joint Chiefs of Staff (JCS), and Intelligence Community agencies to facilitate intelligence support to weapons systems acquisition. If the result of the IPT process indicates a need for modification or replacement of an intelligence system, our facilitators provide technical and acquisition advice and analysis in intelligence and weapons procurement. We outline and support implementation of strategies to achieve involvement of our clients in the DoD and acquisition process for major weapons systems, to include the Defense Acquisition Board (DAB), the Defense Resources Board (DRB), Intelligence Community Expanded DRB, and Congressional levels.

Description of Professional Labor Categories

SIN 874-1: CONSULTING SERVICES

SIN 874-2: FACILITATION SERVICES

1. SENIOR MANAGER

Experience: At least ten (10) years experience in a related field including supervisory or management experience.

Functional Responsibility: The Senior Manager provides management and technical direction to program managers or other program or project personnel. He or she regularly exercises independent judgment as well as a high level of analytical skill in solving complex and unusual technical, administrative, and managerial problems. The Senior Manager is ultimately responsible for project planning, execution, and performance.

Education: M.B.A., M.S., or M.A. degree in an associated discipline.

2. PROGRAM MANAGER

Experience: At least ten (10) years experience in a related field with at least five (5) years of high-level supervisory and management experience to include responsibilities for implementation and execution of a quality management system and earned value management. Must be generally knowledgeable of federal and DoD acquisition policies and procedures.

Functional Responsibility: The Program Manager is responsible for all aspects of program performance and provides overall direction to all program level activities and personnel. He or she solves complex technical, administrative, and managerial problems involving a prime contractor and at least two (2) subcontractor companies / consultants and at least two (2) client/customer technical leads. He or she is responsible for routinely interfacing with both the client / customer contracting officer representative and subcontractor/consultant performance management and technical personnel to establish standards and performance metrics to ensure full contract and subcontract performance in all aspects. He or she directs the collection of relevant data from the prime contractor and all subcontractors to prepare quantity, quality, time, and budget reports, deliver associated presentations, and directs meetings to ensure program performance to standard as indicated by the established performance metrics. The Program Manager directs the efforts of multiple project managers to complete tasks within estimated time frames and budget constraints.

Education: M.B.A. , M.S., or M.A. degree in an associated discipline.

Additional Required Qualifications: Project Management certification; successful completion of Earned Value Management courses.

Desired Qualifications: Federal and/or DoD acquisition education.

3. PROJECT MANAGER

Experience: At least eight (8) years experience in a related field including supervisory or management experience.

Functional Responsibility: The Project Manager is responsible for all aspects of project performance and provides overall direction to all project level activities and personnel. He or she solves complex technical, administrative, and managerial problems and is responsible for interfacing with customer management and

technical personnel, preparing reports, delivering presentations, and participating in meetings. The Project Manager directs the completion of tasks within estimated time frames and budget constraints.

Education: M.B.A., M.S., or M.A. degree in an associated discipline.

4. PRINCIPAL PROGRAM ANALYST

Experience: At least five (5) years experience in consultation and facilitation professional services to U.S. Government agencies, with concentration on the DoD Planning, Programming, Budgeting, and Execution (PPBE) system and Agencies of the United States Intelligence Community, and/or with a concentration on the National Intelligence Program (NIP) Capabilities Programming and Budgeting System (CPBS).

Functional Responsibility: The Principal Program Analyst is a **functional and subject matter expert (SME)** who analyzes client needs to determine functional requirements as they apply to client systems or solutions. Under the direction of a Project Manager, he or she leads complex, enterprise-wide engagements, oversees planning, client problem solving, and recommendation development. He or she **may work independently** or with other program analysts to incorporate functional requirements into new or existing management systems and may remain involved through the design and final implementation of the resulting systems. Upon implementation, the Principal Program Analyst may be on-site with client agencies to support reports and analysis derived from new system applications. The Principal Program Analyst demonstrates exceptional oral and written communications skills.

Education: B.S./B.A. degree in an associated discipline, M.B.A., M.S., or M.A. desired.

5. ASSOCIATE PROGRAM ANALYST

Experience: At least three (3) years experience in consultation and facilitation professional services to U.S. Government agencies, with concentration on the DoD Planning, Programming, Budgeting, and Execution (PPBE) system and Agencies of the U.S. Intelligence Community, and/or with a concentration on the National Intelligence Program (NIP) Capabilities Programming and Budgeting System (CPBS).

Functional Responsibility: The Associate Program Analyst is a **functional expert** who analyzes client needs to determine functional requirements as they apply to client systems or solutions. Under the direction of a Project Manager and/or Principal Program Analyst, he or she performs complex, enterprise-wide engagements, client problem solving, and recommendation development. He or she **works in a team with other program analysts** to incorporate functional requirements into new or existing management systems and may remain involved through the design and final implementation of the resulting systems. Upon implementation, the Associate Program Analyst may be on-site with client agencies to support reports and analysis derived from new system applications. The Associate Program Analyst demonstrates exceptional oral and written communications skills.

Education: B.S./B.A. degree in an associated discipline, M.B.A., M.S., or M.A. desired.

6. ASSISTANT PROGRAM ANALYST

Experience: **Entry level experience** in consultation and facilitation professional services to U.S. Government agencies, with concentration on the DoD Planning, Programming, Budgeting, and Execution (PPBE) system and Agencies of the U.S. Intelligence Community, and/or with a concentration on the National Intelligence Program (NIP) Capabilities Programming and Budgeting System (CPBS).

Functional Responsibility: The Assistant Program Analyst analyzes client needs to determine functional requirements as they apply to client systems or solutions. Under the direction of a Project Manager and/or

Principal Program Analyst, he or she performs problem-solving and recommendation development. He or she works in a team with other program analysts to incorporate functional requirements into new or existing management systems and may remain involved through the design and final implementation of the resulting systems. Upon implementation, the Assistant Program Analyst may be on-site with client agencies to support reports and analysis derived from new system applications. The Assistant Program Analyst demonstrates exceptional oral and written communications skills.

Education: B.S./B.A. degree in an associated discipline or equivalent experience.

7. SENIOR MANAGEMENT ANALYST

Experience: More than two (2) years experience in the use and application of management improvement systems and programs to U.S. Government agencies, with concentration on the Department of Defense (DoD) Planning, Programming, Budgeting, and Execution (PPBE) System and Agencies of the U.S. Intelligence Community, and/or with a concentration on the National Intelligence Program (NIP) Capabilities Programming and Budgeting System (CPBS).

Functional Responsibility: The Senior Management Analyst analyzes client needs to determine systems requirements as they apply to the client's management systems. Under the direction of a Principal Program Analyst and or Associate Program Analyst, he or she reviews client engagements and participates in client problem-solving and in the recommendation development process. As directed by a Principal Program Analyst and or Associate Program Analyst, the Senior Management Analyst may lead other management analysts in the performance of complex, enterprise-wide engagements, overseeing planning, client problem solving, and recommendation development. He or she may work independently or with other management or program analysts to incorporate requirements into new or existing information management systems and may remain involved through the design and final implementation of the resulting systems. Upon implementation, the Senior Management Analyst may be on-site with client agencies to support reports and analysis derived from new system applications. The Senior Management Analyst demonstrates good oral and written communications skills.

Education: M.B.A., M.S., or M.A. degree in an associated discipline.

8. MANAGEMENT ANALYST

Experience: At least two (2) years experience in the use and application of management improvement systems and programs to U.S. Government agencies, with concentration on the DoD Planning, Programming, Budgeting, and Execution (PPBE) system and Agencies of the U.S. Intelligence Community, and/or with a concentration on the National Intelligence Program (NIP) Capabilities Programming and Budgeting System (CPBS).

Functional Responsibility: The Management Analyst analyzes client needs to determine systems requirements as they apply to the client's management systems. Under the direction of a Principal Program Analyst and or Associate Program Analyst, he or she reviews client engagements and participates in client problem-solving and in the recommendation development process. He or she works in a team with other program staff to incorporate requirements into new or existing information management system and may remain involved through the design and final implementation of the resulting systems. Upon implementation, the Management Analyst may be on-site with client agencies to support reports and analysis derived from new system applications. The Management Analyst demonstrates good oral and written communications skills.

Education: B.S./B.A. degree in an associated discipline, M.B.A., M.S., or M.A. desired.

9. MANAGEMENT ASSISTANT

Experience: Entry-level experience in providing assistance to managers in accomplishing their routine operational and administrative duties and responsibilities.

Functional Responsibility: The Management Assistant provides client agencies management support in the following areas: budget and funding data entry and spreadsheet analysis, contracts data maintenance and tracking, to include documentation and files preparation and retrieval in paper and electronic media, initial budgeting, funding, and contracts requirements identification and preparation such as draft cost estimates and draft Statements of Work, assists with finalization of budgeting, funding and contract documents and correspondence, conducts basic coordination with supporting finance and accounting offices and contracting activities. He/she assists management with identifying and tracking, budgeting, funding and contracting suspense dates using methods directed by management. He/she works effectively in a team of budgeting, funding and contracting specialists under the direct supervision of a more senior analyst or the head of the supported office. The Management Assistant demonstrates above average oral and written communications skills.

Education: Minimum Associates degree in an associated discipline or equivalent experience; BS/BA degree preferred.

10. SENIOR OFFICE MANAGER/EXECUTIVE ASSISTANT

Experience: At least five (5) years' experience in professional office management and administration for U.S. Government officials in the Senior Executive Service, or equivalent, and corporate senior managers.

Functional Responsibility: The Senior Office Manager/Executive Assistant provides client agencies administrative support in the following areas: calendar support, general clerical, maintains property accountability, recommends supply procurement and obtains supplies at the direction of the client, provides conference planning and support, prepares final copies of papers, briefings and correspondence in accordance with office correspondence standards. Assists with the management of the office security program to include processing classified visit requests to other DoD and Federal Government agencies and activities. The Senior Office Manager/Executive Assistant demonstrates excellent interpersonal skills, mature decision making, and exceptional oral and written communications skills and is able to work effectively and successfully with minimal direct supervision.

Education: B.S./B.A. degree in a related discipline or equivalent experience.

11. OFFICE MANAGER ADMINISTRATIVE SUPPORT

Experience: At least one year experience the management of an office and providing administrative support.

Functional Responsibility: The Office Manager provides client agencies administrative support in the following areas: calendar support, general clerical, maintains property accountability, obtain supplies at the direction of the client, provide conference support, and assist with finalization of papers, briefings and correspondence. Assists with the management of office security program to include processing classified visit requests to other agencies and activities. The Office Manager demonstrates exceptional oral and written communications skills.

Education: B.S./B.A. degree in an associated discipline or equivalent experience.

MOBIS Rate Tables Special Item Nos. 874-1 Consulting Services & 874-2 Facilitation Services

JB&A, INC. MOBIS Schedule

GSA Schedule GS-10F-0012K—includes Modifications through PO-0014, dated October 14, 2009

CONTRACT PERIOD: October 15, 2009 through October 14, 2014

		FY2010	FY2011	FY2012	FY2013	FY2014
Senior Manager	Billing Rate	\$183.39	\$189.81	\$196.45	\$203.33	\$210.45
	Daily Rate	\$1,467.13	\$1,518.48	\$1,571.63	\$1,626.64	\$1,683.57
Program Manager	Billing Rate	\$171.19	\$177.18	\$183.38	\$189.80	\$196.44
	Daily Rate	\$1,369.51	\$1,417.44	\$1,467.06	\$1,518.40	\$1,571.55
Project Manager	Billing Rate	\$153.07	\$158.42	\$163.97	\$169.71	\$175.65
	Daily Rate	\$1,224.53	\$1,267.39	\$1,311.75	\$1,357.66	\$1,405.18
Principal Program Analyst	Billing Rate	\$125.22	\$129.61	\$134.14	\$138.84	\$143.70
	Daily Rate	\$1,001.80	\$1,036.86	\$1,073.15	\$1,110.71	\$1,149.59
Associate Program Analyst	Billing Rate	\$114.15	\$118.15	\$122.28	\$126.56	\$130.99
	Daily Rate	\$913.20	\$945.16	\$978.24	\$1,012.48	\$1,047.92
Assistant Program Analyst	Billing Rate	\$88.98	\$92.09	\$95.32	\$98.65	\$102.11
	Daily Rate	\$711.83	\$736.75	\$762.53	\$789.22	\$816.84
Office Manager	Billing Rate	\$58.61	\$60.66	\$62.79	\$64.98	\$67.26
	Daily Rate	\$468.90	\$485.31	\$502.29	\$519.87	\$538.07
Senior Management Analyst	Billing Rate	\$100.50	\$104.02	\$107.66	\$111.42	\$115.32
	Daily Rate	\$803.99	\$832.13	\$861.25	\$891.40	\$922.59
Management Analyst	Billing Rate	\$97.77	\$101.19	\$104.73	\$108.40	\$112.19
	Daily Rate	\$782.13	\$809.50	\$837.84	\$867.16	\$897.51
Management Assistant	Billing Rate	\$53.45	\$55.32	\$57.25	\$59.26	\$61.33
	Daily Rate	\$427.58	\$442.54	\$458.03	\$474.06	\$490.66
Senior Office Manager/ Executive Assistant	Billing Rate	\$76.67	\$79.36	\$82.13	\$85.01	\$87.98
	Daily Rate	\$613.38	\$634.85	\$657.07	\$680.07	\$703.87

Ordering Procedures for Services Requiring a Statement of Work (SOW)

Ordering activities shall use the procedures in Federal Acquisition Regulation (FAR) 8.405-2 when ordering Schedule contract services priced at hourly rates. The applicable services will be identified in Schedule publications and contractors' Schedule pricelists.

When ordering services exceeding \$100,000 *using DoD funds*, ordering activities shall follow the Defense Federal Acquisition Regulation Supplement (DFARS), which has been amended to implement Section 803 of the National Defense Authorization Act for Fiscal Year 2002 (Public Law 107-107). DoD offices and non-DoD activities placing orders on behalf of DoD should refer to DFARS 208.404 for additional information regarding ordering procedures and documentation requirements.

When ordering services requiring a SOW, ordering activities shall—

Prepare a Request for Quotation (RFQ) that includes:

- **A SOW.** To the maximum extent practicable, agency requirements shall be performance-based statements. All SOWs shall include the work to be performed, the location of the work, the period of performance, the deliverable schedule, the applicable performance standards, and any special requirements (e.g., security clearances, travel, and special knowledge).
- **The evaluation criteria (e.g., project plan for performing the task, price, experience, and past performance).**
 - A firm-fixed price order shall be requested, unless the ordering activity makes a determination that it is not possible at the time of placing the order to estimate accurately the extent or duration of the work or to anticipate cost with any reasonable degree of confidence. When such a determination is made, a labor-hour or time-and-materials quotation may be requested. The firm-fixed price of the order should also include any travel costs or other direct charges related to performance of the services ordered, unless the order provides for reimbursement of travel costs at the rates provided in the Federal Travel or Joint Travel Regulations. A ceiling price must be established for labor-hour and time-and-materials orders.
 - Ordering activities may consider socioeconomic status when identifying contractors for consideration or competition for award of an order or a Blanket Purchase Agreement (BPA). At a minimum, ordering activities should consider, if available, at least one small business, veteran-owned small business, service disabled veteran-owned small business, HUBZone small business, women-owned small business, or small disadvantaged business Schedule contractor. GSA Advantage![®] and Schedules e-Library contain information on small business representations of Schedule contractors.

A requirement for pricing information that ties the offered prices to the Schedule contract prices and seeks additional price reductions where appropriate.

Transmit the RFQ to GSA Schedule Contractors. The RFQ may be posted to e-Buy, GSA's electronic RFQ system.

- **Orders at, or below, the micro-purchase threshold.** The ordering activity may place orders with any GSA Schedule contractor that can meet the agency's needs. The ordering activity should attempt to distribute orders among Schedule contractors.
- **Orders exceeding the micro-purchase threshold, but not exceeding the maximum order threshold.**
 - The ordering activity shall provide the RFQ (including the SOW and evaluation criteria) to at least three (3) Schedule contractors that offer services that meet the agency's needs.
 - The ordering activity should request that contractors submit firm-fixed prices to perform the services identified in the SOW.

Note: Each Schedule contractor has a maximum order threshold, which will vary by special item number. The maximum order threshold represents the point where, given the dollar value of the potential order, the ordering activity shall seek a price reduction.

- **Orders exceeding the maximum order threshold or when establishing a BPA.** In addition to meeting the requirements, above, for orders exceeding the micro-purchase threshold, but not exceeding the maximum order threshold, the ordering activity shall—
 - Provide the RFQ (including the SOW and evaluation criteria) to an appropriate number of additional Schedule contractors that offer services that will meet the needs of the ordering activity. When determining the appropriate number of additional Schedule contractors, the ordering activity may consider the complexity, scope, and estimated value of the requirement, and the market search results.
 - Seek price reductions.
- **Distribution of the RFQ.** The ordering activity shall provide the RFQ (including the SOW and the evaluation criteria) to any Schedule contractor that requests a copy.

Evaluate Responses and Place the Order or Establish the BPA.

- The ordering activity shall evaluate all responses received using the evaluation criteria in the RFQ.
- GSA has already determined that the hourly rates for services contained in the Schedule contractor's pricelist are fair and reasonable. However, the ordering activity is responsible for considering the level of effort and the mix of labor proposed to perform a specific task being ordered, and for determining that the total firm-fixed price or ceiling price is fair and reasonable.
- The ordering activity should then place the order, or establish the BPA, with the Schedule contractor that represents the best value (see [FAR 8.404\(d\)](#)).
- After award, the ordering activity should provide timely notification to unsuccessful offerors. If an unsuccessful offeror requests information on an award that was based on factors other than price alone, a brief explanation of the basis for the award shall be provided.

Documentation.

At a minimum, the ordering activity shall document:

- The Schedule contracts considered, noting the contractor from which the service was purchased;
- A description of the service purchased;
- The amount paid;

- If applicable, the circumstances and rationale for restricting consideration of Schedule contractors to fewer than required in these ordering procedures (see [FAR 8.405-6](#));
- The evaluation methodology used in selecting the contractor to receive the order;
- The rationale for any tradeoffs in making the selection;
- The fair and reasonable price determination; and
- If applicable, the rationale for using other than a firm-fixed price order or a performance-based order.

REMEMBER! Ordering activities placing GSA Schedule contract orders (*particularly if government-wide commercial purchase cards are used*), should advise Schedule contractors that they are authorized Schedule users and cite the appropriate GSA Schedule contract number on each ordering document, in order to ensure that they receive Schedule contract services at Schedule contract prices. All services ordered shall be within the scope of the GSA Schedule contract.

Contractor Team Arrangements

CONTRACTOR TEAM ARRANGEMENTS AND FEDERAL SUPPLY SCHEDULES

In the spirit of the Federal Acquisition Streamlining Act, all Federal agencies have been encouraged to facilitate innovative contracting/acquisition approaches. [FAR Part 1.102](#) provides Guiding Principles on the Federal Acquisition System, outlining what the System will achieve --

- ❖ Satisfy the customer (cost, quality and timeliness of delivery).
- ❖ Maximize use of commercial products and services.
- ❖ Using contractors with track record of successful past performance.
- ❖ Promoting competition.
- ❖ Minimize administrative costs.
- ❖ Conduct business with integrity, fairness and openness.
- ❖ Fulfill public policy objectives.

The Federal Supply Schedule (FSS) program is a source that customers may use to achieve what the System has outlined for Acquisition Teams to follow.

Each member of the “Acquisition Team” is to exercise personal initiative and sound business judgment and is responsible for making acquisition decisions that deliver the best value product or service to meet the customers’ needs. [FAR 1.102-4](#) further empowers Government Team members to make acquisition decisions within their areas of responsibility including selection, negotiation and administration. The contracting officer has the authority to the maximum extent practical, to determine the applications of rules, regulations, and policies.

In light of these changes, FSS customers may refer to [FAR 9.6 - Contractors Team Arrangements](#). The policy and procedures outlined in this part will provide more flexibility and allow innovative acquisition methods when using the FSSs. Customers are encouraged to review this section and should note this is permissible after contract award. Contractor Team Arrangements (CTAs) combined with the FSS Program provide Federal customers a powerful commercial acquisition strategy.

BASIC GUIDELINES FOR USING “CONTRACTOR TEAM ARRANGEMENTS”

- ❖ FSS contractors may use “CTAs” (see [FAR 9.6](#)) to provide solutions when responding to a customer agency requirements.
- ❖ These CTAs can be included under a Blanket Purchase Agreement (BPA). BPA’s are permitted under all FSS contracts.
- ❖ Orders under a CTA are subject to terms and conditions of the FSS contract.
- ❖ Participation in a CTA is limited to FSS contractors.
- ❖ Customers should refer to [FAR 9.6](#) for specific details on CTAs.

Here is a general outline on how it works:

- ❖ The customer identifies their requirements.
- ❖ FSS contractors may individually meet the customers needs, or -
- ❖ FSS contracts may submit a Schedules “Team Solution” to meet the customer’s requirement.
- ❖ Customers make a best value selection.

BPA NUMBER _____

**(CUSTOMER NAME)
BLANKET PURCHASE AGREEMENT (BPA)**

Pursuant to GSA Federal Supply Schedule Contract (FSS) Number(s) _____, BPAs, the Contractor agrees to the following terms of a BPA EXCLUSIVELY WITH (Ordering Agency):

(1) The following contract items can be ordered under this BPA. All orders placed against this BPA are subject to the terms and conditions of the contract, except as noted below:

MODEL NUMBER/PART NUMBER	*SPECIAL BPA DISCOUNT/PRICE
_____	_____
_____	_____

(2) Delivery:

DESTINATION	DELIVERY SCHEDULE/DATES
_____	_____
_____	_____

(3) The Government estimates, but does not guarantee, that the volume of purchases through this agreement will be _____.

(4) This BPA does not obligate any funds.

(5) This BPA expires on _____ or at the end of the contract period, whichever is earlier.

(6) The following office(s) is (are) hereby authorized to place orders under this BPA

OFFICE	POINT OF CONTACT
_____	_____
_____	_____

(7) Orders will be placed against this BPA via Electronic Data Interchange (EDI), FAX, or paper.

(8) Unless otherwise agreed to, all deliveries under this BPA must be accompanied by delivery tickets or sales slips that must contain the following information as a minimum:

- (a) Name of Contractor;
- (b) Contract Number;
- (c) BPA Number;
- (d) Model Number or National Stock Number (NSN);
- (e) Purchase Order Number;
- (f) Date of Purchase;

(g) Quantity, Unit Price, and Extension of Each Item (unit prices and extensions need not be shown when incompatible with the use of automated systems; provided, that the invoice is itemized to show the information); and

(h) Date of Shipment.

(9) The requirements of a proper invoice are specified in the FSS contract. Invoices will be submitted to the address specified within the purchase order transmission issued against this BPA.

(10) The terms and conditions included in this BPA apply to all purchases made pursuant to it. In the event of an inconsistency between the provisions of this BPA and the Contractor's invoice, the provisions of this BPA will take precedence.